| GDS Phase 2 Advisory Committee Meeting | 3/18/2008<br>1:30 PM<br>**South Executive Conference Room - Teleconference** |
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**Meeting called by:** Debi Jackson

**Attendees:** Cherie Hood, Debi Jackson, Bryan Dickason, Catalina Mistler, Cheryl Lenz, Lora Jo Bossio, John Bays, Thea Pot-Van Atta, Tim Lord, Justin Masters, Craig Slaughter, , Tenia Summerville, Rivka Weinberg, Eric Thorson, Heidi Dillion,

**Please bring:**

## Agenda

| Introduction | Debi |
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| Review Draft Requirements of Requirement #5.1 – 5.7 | Bryan - all |
| Open discussion / Summary | Team |

## Additional Information

Next Meeting 1 April 2008

## Review Requirements

The Advisory Committee met and provided feedback on the draft requirements that Bryan Dickason developed.  Bryan walked us through the requirements one at a time and acquired inputs and outputs from the members.  This was very productive and allowed members to identify what and why they needed the information.  The team decided that requirement #5.6 and #5.7 were duplicates from the other requirements and that it was not necessary to have them.  The team also concluded that the queries that were defined would be categorized in two groups.  The groups are:

1. Award Status Queries – this group will be for requirement 5.1 – 5.3.  These queries provide data comparisons for students' award status.
2. Payment Status Queries - this group will be for requirement 5.4 – 5.5.  These queries provide data comparisons for students' payment status.
3. Requirement # 5.6 - #5.7 are deleted.

See the attachment of requirements with all the discussed changes.

.The web site is:  http://www.csac.ca.gov/gds_web2_doc.asp?id=1335

Debi asked the members the priority of the web services to be provided.  The members agreed to the following:

#1 – Payment uploads – This would allow schools to upload a file to CSAC with payment information.  This file will have the following fields: Name, SSN, CSAC ID, Program Type, Enrollment Status, EL level, Academic Year for payment, term, and remaining eligibility.

#2 – Award Status – Confirm SSN awarded appears on roster. Group by school, sort by Award Type.

#3 – School Changes – upload file, Student coming to school in XML file.

#4 Student Demographics Changes – upload & download – compare by date, last update date, by school change, by student change.

# 5 Award Status Queries – Requirement #5.1 - #5.3

#6 Payment Status Queries – Requirement #5.4 - #5.5

| Tasks: | |
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| | |

## Open Discussion

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| Next Meeting | 1 April 2008 |
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| | **Review feedback from demonstration and the web site.** |

# Web Services: Data Retrieval Queries

Phase II Advisory Committee

## Award Status Queries

**Requirement #5.1.**

Compare schools database to the WebGrants database

Sort by Academic Year
Sort by Student Name and CSAC ID

Student awarded in WebGrants but not in schools database.

**Input:**

The school would send us the SSN of any student for whom they wish to inquire.

**Output: By School**

The output record for those with an eligibility award contains the following information:

SSN
CSAC ID
Last Name
First Name
Middle Initial
Date of Birth
New or Renewal
Education Level
Remaining Eligibility
Program type
Total Award amount
Tuition and Fees
Tuition and Fees Amount
Access
Access Award amount
Books and Supplies
Books and Supplies Amount
Award Program (E1,E2,C1.C2)

Those not returning with an eligible award would output only an SSN.

 This query is like Award Status Extract in Web Grants.

**Requirement #5.2.**

Compare schools database to the WebGrants database

Students awarded in their database but not in WebGrants

Sort By Academic Year

See this as the same as number 1 above.  The school would still send us the SSN of any student for whom they wish to inquire.

**Input:**

The school would send us the SSN of any student for whom they wish to inquire.

**Output:**

The output record for those with an eligibility award contains the following information:

SSN
CSAC ID
Academic year
Last Name
First Name
Middle Initial
Date of Birth
New or Renewal
Education Level
Remaining Eligibility
Program type
Total Award amount
Tuition and Fees
Tuition and Fees Amount
Access
Access Award amount
Books and Supplies
Books and Supplies Amount
Award Program (E1,E2,C1.C2)

Those not returning with an eligible award would output only an SSN.

**Requirement #5**.3.


Compare schools database to the WebGrants database
Award types that do not match

Sort by Student Name and CSAC ID

**Input:**

*SSN
*Academic year
*Award Type

**Output:**
(only discrepancies are reported)

SSN
CSAC ID
Academic year
Last Name
First Name
Middle Initial
Award type

<div align="center">**Payment Status Queries**</div>

**Requirement #5.4.**

Compare schools database to the WebGrants database

Quarterly/Semester payments that do not match


Sort By Academic Year

**Input:**

SSN
Academic year
Fall Tuition and Fees Paid
Winter Tuition and Fees Paid
Spring Tuition and Fees Paid
Summer Tuition and Fees Paid
Fall Access Paid
Winter Access Paid
Spring Access Paid
Summer Access Paid
Fall Books and Supplies Paid
Winter Books and Supplies Paid
Spring Books and Supplies Paid
Summer Books and Supplies Paid

**Output:**

(only discrepancies are reported)

SSN  , Name , CSAC ID
Academic year
Fall Tuition and Fees Paid
Winter Tuition and Fees Paid
Spring Tuition and Fees Paid
Summer Tuition and Fees Paid
Fall Access Paid
Winter Access Paid
Spring Access Paid
Summer Access Paid
Fall Books and Supplies Paid
Winter Books and Supplies Paid
Spring Books and Supplies Paid
Summer Books and Supplies Paid

**Requirement #5.5.**

Provide an Intranet application that automatically pulls new or changed records from CSAC at login, and then displays the relevant FAM data needed to process the student. Identify by last change date.
  Sort by Academic Year

This is similar to #4 above.  Upon log-in, the query could be triggered.
Like Compare tool in WebGrants
This type of service will require a counter or other record of which records have changed since the last query.  When a later query is received, the changes from prior data are delivered.

**Input:**

SSN
Academic year
Fall Tuition and Fees Paid
Winter Tuition and Fees Paid
Spring Tuition and Fees Paid
Summer Tuition and Fees Paid
Fall Access Paid
Winter Access Paid
Spring Access Paid
Summer Access Paid
Fall Books and Supplies Paid
Winter Books and Supplies Paid
Spring Books and Supplies Paid
Summer Books and Supplies Paid

**Output:** (only discrepancies are reported)

SSN
Academic year
Fall Tuition and Fees Paid
Winter Tuition and Fees Paid
Spring Tuition and Fees Paid
Summer Tuition and Fees Paid
Fall Access Paid
Winter Access Paid
Spring Access Paid
Summer Access Paid
Fall Books and Supplies Paid
Winter Books and Supplies Paid
Spring Books and Supplies Paid
Summer Books and Supplies Paid

**Requirement #5.6**. – **Same as #5.4 – don't use.**

Provide an automated school process that pulls new grants (new to the roster) from CSAC and automatically posts those records to the FAM, and perhaps puts them into a holding queue to be worked by staff at the school.
Web Services
Sort By Academic Year
Sort by Student Name and CSAC ID

**This is same as #4 above.**  Upon log-in, the query could be triggered.

This type of service will require a counter or other record of which records have changed since the last query.  When a later query is received, the changes from prior data are delivered.

**Input:**

SSN
Academic year
Fall Tuition and Fees Paid
Winter Tuition and Fees Paid
Spring Tuition and Fees Paid
Summer Tuition and Fees Paid
Fall Access Paid
Winter Access Paid
Spring Access Paid
Summer Access Paid
Fall Books and Supplies Paid
Winter Books and Supplies Paid
Spring Books and Supplies Paid
Summer Books and Supplies Paid

**Output**:  (only discrepancies are reported)

SSN
Academic year
Fall Tuition and Fees Paid
Winter Tuition and Fees Paid
Spring Tuition and Fees Paid
Summer Tuition and Fees Paid
Fall Access Paid
Winter Access Paid
Spring Access Paid
Summer Access Paid
Fall Books and Supplies Paid

Winter Books and Supplies Paid
Spring Books and Supplies Paid
Summer Books and Supplies Paid


**Requirement #5.7**. – **Same as #5.5 – don't use.**

Provide an Intranet application that pulls all of the grant payment data out of the FAM, and then uses the CSAC web services to pull real-time reconciliation data from CSAC, compare the two sets of data and display any exceptions or un-reconciled accounts via the web browser on an intranet.


Sort By Academic Year
Sort by Student Name and CSAC ID

Web Services does not allow displays. This needs to be discussed.


Helen Montag has wish list for WebGrants that I've kept over the past year or so, just working the program here at CSUSM. Some of these topics have been addressed, but perhaps not all?

1. It will be great to get real-time activity, posted, reconciled, and downloaded. No more batch processing, no more waiting twice a month to see which payments have been accepted and are fully reconciled, and what amount will be paid to the University to cover Cal Grant awards paid to students.
2. The annual need entered into WebGrants should not be "ROUNDED DOWN". This is a problem in WebGrants now for students whose annual need is LESS THAN their scheduled award amount. WebGrants systematically rounds down the annual need posted, which constricts the school's ability to award the full amount a student is actually eligible for.
3. I'd like to be able to hit <enter> instead of having to always select <Go> when making selections in WebGrants. Having to always select <Go> seems antiquated, when I consider all the programs we work with.
4. I'd like to be able to enter a Leave of Absence (LA) for a student for Fall and still be able to post a payment for this student in Spring. The way things are now, if a student has LA for Fall, I'm unable to post a payment for Spring on WebGrants. I have to call Ofelia.
5. I'd like to be able to "undo" a withdrawal from the program. If a student has 50% remaining eligibility, and the final payment is posted, accepted, and reconciled, there is no way for me to "undo" the final payment. The WebGrants screen for this student has all fields closed. I have to call Ofelia to "open up" the student's record so that I may make a correction to the final payment.
6. I'd like the macros to work with Excel 2000, Excel 2003, and now Excel 2007.
7. I'd like the Roster Compare Delphi executable (from UC Davis) to do a better job comparing rosters week to week. It should pick up ANY differences between

rosters, be they Program changes, Need Changes, Award Amount Changes, Transfer Entitlement (with asterisk -- *E2s) changes, etc etc. Right now this is one of the best tools we have – but it's limited to comparing rosters in 3 basic areas: 1) new to roster; 2) changes (but these are limited changes); and 3) dropped from roster

8. I'd like the Training Manual to be up-to-date, chapters 1-12. I'd like the Training Manual to include specific references of CSAC audit findings that are relevant to the topics covered in each Chapter of the Manual.

9. I'd like to be able to have more customized reporting capability. Right now I'm limited to 6 custom reports. Please give us as much additional customization as possible;

10. I'd like to have a better (and more complete) description of the reports that are available in the DATA TRANSFER area. It would be helpful to have more knowledge of how/why/when each report was created, and what the purpose of the report is, how it can best be used by the schools.

11. I'd like WebGrants to get rid of reports that are no longer functional. Some of the reports were created a long time ago, and the purpose for the report is obsolete.

Thank you, Sincerely, Helen Montag, Asst Dir Financial Aid & Scholarships, California State University San Marcos